

Account Number	Account Name
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Personal & Regulatory Information Common Reporting Standards (CRS) Update

Indicate your relationship to the account:

- Primary owner Joint owner

INFORMATION ABOUT YOU

Scotiocard Number (Required for online access) **Mother's Maiden Surname** (Required for online access)

If you do not have a Scotiocard, but would like online access, please check box to have one issued. Send Scotiocard: Yes No

Title	First Name	Initial	Last Name
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Date of Birth (mm/dd/yyyy)	Country of Citizenship
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Social Insurance Number	SSN / TIN*
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* If you are a U.S citizen, a U.S dual citizen or are considered a "US Person", a Social Security Number (SSN) and W9 form are also required.

Are you (individual or entity) a tax resident of a jurisdiction other than Canada or the U.S.? Yes No If yes, list up to three jurisdictions and the Tax Identification Number (TIN).

If you do not have a TIN for one of the below noted jurisdictions, please indicate one of the following reason codes:

Reason Code 1: I will apply or have applied for a TIN, but have not yet received it (TIN is required within a year)

Reason Code 2: My jurisdiction of tax residence does not issue TINs to its residents

Reason Code 3: Other - Specify (TIN is required within a year)

1. _____ TIN _____ Reason Code ____ Other - specify _____
2. _____ TIN _____ Reason Code ____ Other - specify _____
3. _____ TIN _____ Reason Code ____ Other - specify _____

Signature

Date
